

White Paper

Five Examples of Web Form Best Practice

Providing you with:

- ✓ Recommendations to increase form conversions
- ✓ Examples of user experience best practice
- ✓ References for further reading



Introduction

The importance of the web form as an online communication tool cannot be overstated. It turns a one-way flow of information on your website into a two-way dialogue with your end-users and enables them to complete tasks which are more often than not inextricably tied to the success of your business (such as registering interest, making a purchase or requesting information). However, people rarely come to a website specifically to complete a form and instead often view it as a barrier that must be overcome in order to achieve their desired goal(s). Making the process as easy as possible is imperative.

An effective web form is made up of lots of different elements, most of which vary according to the nature of the form and the type of device being used to access it. This post details five pieces of best practice advice with which you can start to improve the User Experience (UX) of your own web forms and significantly boost your conversion rate.



Justify the inclusion of each form field

One of the most important things to bear in mind when designing a form is length. Keep your forms as short as possible by only including input fields that are absolutely necessary and remember that for every form you include on your site your users have to: (1) read and understand what is required from them; (2) decide on a response; and (3) input that response. Regarding these considerations and the potential cognitive burden of each additional field Luke Wroblewski notes: “the best way to speed up that process is not to ask the question at all [if it is not of immediate relevance]”.

Studies have confirmed a strong correlation between fewer questions and higher form completion rates (see Brian Moloney, [“Further Reading”](#)); a pattern supported by our own experience of testing at Box UK. For example, in a newsletter form redesign project taking fields such as ‘Marital status’, ‘Gender’, Date of birth’, ‘Second contact number’ and ‘How did you find this site?’ out of the initial form increases the number of form completions. While this information is of value to the client’s marketing team, being asked for it at this early stage of the journey was considered unnecessary or even worse invasive and overly personal by some end-users.

Figure 1: a newsletter registration form, complete with unnecessary fields

Personal details

Title: *	<input type="text" value="Select"/>	House number / name: *	<input type="text"/>
First name: *	<input type="text"/>	Address line 1: *	<input type="text"/>
Surname: *	<input type="text"/>	Address line 2	<input type="text"/>
Date of birth: *	<input type="text" value="DD"/> <input type="text" value="MM"/> <input type="text" value="YYYY"/>	City: *	<input type="text"/>
Sex: *	<input type="text" value="Select"/>	Postcode: *	<input type="text"/>
Martial status: *	<input type="text" value="Select"/>	Country: *	<input type="text" value="Select"/>
Occupation:	<input type="text" value="Select"/>	How did you find us?	<input type="text" value="Select"/>
Landline number: *	<input type="text"/>	Email address: *	<input type="text"/>
Mobile number:	<input type="text"/>	Confirm email address: *	<input type="text"/>

This response is not uncommon and often a better approach is to try and capture this data at a different point in the user journey. In our example some fields were moved to the form's confirmation page and others to registered users' 'My Account' profile settings. This new strategy not only increased the form's conversion rate, but also provided the client with more (and better quality) marketing data - with customers now in a positive frame of mind (rather than frustrated by what they perceived as 'unnecessary' questions) they were more inclined to tell us about how they found the site, etc.

Figure 2: said newsletter form, redesigned to include only those fields absolutely necessary

Your free monthly newsletter

All fields are optional unless stated otherwise.

Would you like a paper or electronic version?

We are happy to send you a paper newsletter by post or electronic copy via email.

Electronic Paper

Email address:

You will be able to unsubscribe at any time.

Tell us about yourself

Title: First name: Surname:

Contact number:

Allows us to report a problem with your order. [Add new number](#)

[Register](#)

Remember

Your objective should be getting users through the form in as quick and pain-free a way as possible. If some fields are business-critical, but the reasons for this are unlikely to be immediately apparent, then be sure to explain to them why you need the information and how it will be used.



2

Tailor your forms with progressive disclosure

A second tip is to tailor your forms by hiding potentially unnecessary questions at the start of the user journey. For example, in a 'registration' project we suppressed a number of questions because they either weren't relevant to the majority of users or could be asked in a smarter way, and instead revealed them through progressive disclosure only if and when they were required.

In this particular instance, there were a number of fields related to the details of a second family member all of which were replaced with a single link labelled 'Add family member' that, when clicked, showed the relevant fields. As a consequence the form looked significantly less intimidating to complete yet still captured the relevant data where it was appropriate.

In a similar way, logged-in customers shouldn't have to answer the same questions as new users. In these cases form length should be kept to an absolute minimum by displaying details as static text and not including fields unlikely to need updating such as 'Date of birth' and 'Gender' (as in the following example).

Traditional approach

Figure 3: a traditional returning customer form with pre-populated fields

The form is titled 'Personal details' and 'Account details'. It contains various input fields for user information, including title, name, date of birth, sex, marital status, contact number, house name, street, town, and postcode. The 'Account details' section includes email address and password fields.

Personal details

Title:

Name:

Date of birth:

Sex: Male Female

Marital status:

Preferred contact number:
[Add another number](#)

House name / number:

Street / road:

Town / city:

Postcode:

Account details

Email address: Confirm email address:

Password: Confirm password:

Figure 4: a progressive disclosure returning customer form with hidden fields (clicking 'edit' would revert to the traditional display)

Progressive disclosure

The form is titled 'Personal details' and 'Account details'. It displays the user's information in a compact, read-only format. Each section has an 'edit' link next to it.

Personal details [edit](#)

Name: John Smith

Address: 2 Spring Lane, Riverdale AB1 2CD

Marital status: Married

Preferred contact number: 01234 567891

Account details [edit](#)

Email address: john@johnsmith.com

Password: *****

Remember

If you use progressive disclosure it is important to make sure that screen-reading software does not read aloud the hidden questions, by initially setting the CSS commands 'display' to 'none' and 'visibility' to 'hidden'. Take care, however, to update 'display' to 'block' and 'visibility' to 'visible' whenever an activation button is pressed (e.g. 'add another number') to ensure fields remain accessible.

3

Consider the default form selections

A key ingredient of good usability is efficiency and making your form as streamlined as possible should be a top priority. Setting form defaults can help, and there are typically two types: Member and Smart.

Member defaults

Existing members have usually already supplied their personal, payment and account details, and in these cases most fields should be set by default based on this information.

Amazon, for example, have such an efficient purchase process for logged-in users that a product can be bought with a single click.

Figure 5: Amazon's "Buy now with 1-Click"



Smart defaults

Smart defaults are based on the preferences of the majority of users. For example, using tools such as Google Analytics you can identify:

- Common locations
- Product preferences
- Delivery preferences

Aligning your default selections with these findings should result in the majority of users having to make fewer clicks.

Users should of course be able override default selections, but attempting a 'best guess' about what they are likely to pick based on the choices of other users can help make the form easier to complete.

Here are some examples from previous Box UK projects:

Insight	Form default
98% of visitors were UK-based	Country drop-down = 'United Kingdom'
85% of visitors selected a saving product with 'annual' interest payments	Interest payments = 'annual'
80% of users selected 'free delivery'	Delivery option = 'free'

Remember

Attempting a 'best guess' about what users are likely to pick can help make forms easier to complete but you must provide the ability to easily override default selections too.

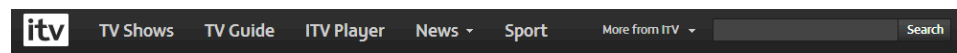
4

Support your users

To enable users to complete your form quickly you should support them throughout the entire user journey. However, it's important to strike the right balance between excessive instruction that is likely to frustrate and insufficient support which can negatively affect completion rates.

For example, in the application form below ITV display a lot of information that details the terms and conditions of entry, eligibility requirements and contact information. A better, more user-friendly approach might have been to take the user through a simple questionnaire that filtered out unsuitable candidates to make the corresponding form much simpler.

Figure 6: ITV's "The Chase" application form has a very long introduction



THE CHASE APPLICATION FORM



The Chase Contestant Application Form

** Please read this application form and the Terms and Conditions very carefully before completing and submitting. **

If you are having trouble viewing this form, please download a version here. If you require a form in a different format please call The Chase Hotline: 0207 157 3816

You are applying to be considered as a contestant in the programme provisionally entitled 'THE CHASE' (the "Programme") which ITV Studios Limited (the "Producer", "we", "us", "our") intends but does not undertake to produce for ITV Network (the "Broadcaster"). The Producer does not guarantee that the Programme will be broadcast.

You hereby undertake that the information you give in this application form is correct and that you meet each of the Eligibility Requirements as detailed below as well accepting the Terms and Conditions of entry. If any of the information you provide in this application form becomes incorrect between the date of this application form and the date of our decision as to whether you have been selected to go forward to the next stage of the selection process, you agree to immediately inform us of the nature of any such change. You hereby acknowledge that, in the event we select you to appear in the Programme and you have given false information on this application form or fail to abide with the Terms and Conditions or any of our other reasonable instructions or directions, then we shall be entitled to terminate your participation in the Programme.

PROGRAMME ELIGIBILITY REQUIREMENTS

1. You must be aged 18 (eighteen) years or over due to the chance for contestants to win a large cash prize. We endeavour to have as diverse a range of contestants appearing on the Programme as possible, including contestants of varying ages.
2. You must be legally resident and currently living in the United Kingdom or the Channel Islands or the Isle of Man.
3. You are not:
 - A: currently employed by the Producer or the Broadcaster and have not been previously employed by the Producer or the Broadcaster; or
 - B: a live-in partner or immediate relative (i.e. mother, father, son, daughter, brother or sister) of an employee of the Producer or the Broadcaster; or
 - C: sufficiently connected with the Programme so that your participation in the Programme could create the appearance of impropriety (unless otherwise approved by us).

Title*

Full Name (First name, Surname)*

Date of Birth*

In contrast, The British Horse Society membership application form includes a simple (and short) checklist at the top of the page to inform users of what is required of them as well as a concise summary of their chosen membership plan, the organisation's contact details, payment options and their policy regarding security to the side.

Figure 7: The British Horse Society's application form provides concise contact, payment and security support

The screenshot shows the 'Join The British Horse Society' application form. At the top, there is a navigation bar with links for 'Contact Us', 'Press Centre', 'Our shop', 'Directory', 'BHS In Your Area', and 'Members-Only Area'. A search bar is also present. Below the navigation bar, there is a banner with the BHS logo and a call to action: 'Seen a horse in distress? Call us 02476 840500'. The main content area is titled 'Join The British Horse Society' and includes a checklist of requirements: 'An email address' and 'Payment details to hand'. Below this, there is a section for '1. Your details' with form fields for Title, First name, Surname, Gender, Preferred phone number, Alternative phone number, Date of Birth, and Select your country. To the right of the form, there is a section for 'Membership option you have chosen' which displays 'BHS Gold Membership' and 'Change selected option'. Below this, there is a 'Get in touch' section with contact information and opening times. Further down, there is a 'Payment methods' section listing VISA, Mastercard, and VISA DEBIT. Finally, there is a 'Security policy' section with a 'SECURE PAYMENT' icon.

Membership option you have chosen

BHS Gold Membership
Change selected option

From £57 - adult 10% off - Students
From £41 - junior (under 21s) Discounted Family membership

Get in touch

For any payment-related questions, please:

CALL US ON 02476 840506

Opening times are 8:35am-5pm from Monday to Thursday and 8:35am-3pm on Friday.

See all our contacts

Payment methods

We accept the following payment methods:

VISA Mastercard VISA DEBIT

DIRECT Debit

Security policy

Your details will be safe with us.

SECURE PAYMENT

Similarly, Aviva provide a shortcut to FAQs as well as a summary of their contact details, cover and policy information and, again, reassurance about security.

Figure 8: Aviva's application form provides easy access to FAQs, contact details and security information

Another obvious way to support your users is to make it easier for them to complete the required form fields. For example, Baymard Institute has developed a great 'country selector' tool that suggests countries based on real-time typing (see Baymard Institute, "[Further Reading](#)"). This is particularly useful for those in the United Kingdom given that 'UK', 'Great Britain', 'Britain', 'Wales', 'Scotland', 'England' and 'Northern Ireland' are all frequently searched for but often covered by a single selection in the form drop-down list.

Figure 9: Baymard Institute's country selector


I live in

USA

United States

Remember too that clear signalling with easily distinguishable primary and secondary Calls To Action (CTAs) helps guide users, while too many options may confuse. For example, during usability testing users found the following page disorienting because there appeared to be multiple primary options and the 'Buy' button conflicted with the progress indicator which said they were only at step 1 of 4 in the process.

Figure 10: non-distinguishable primary and secondary call to actions



Your Quote

Total Annual Premium
£340.74

Monthly Premium
£28.40

All premiums shown are inclusive of Insurance Premium Tax charged at the current rate. The following discounts apply: Introductory Discount, No Claim discount and Joint Buildings & Contents discount.

If, as a result of a change in government legislation, the rate of Insurance Premium Tax changes before you take up a quotation, the new rate of tax will apply and the premium may be changed accordingly.

You can pay by 12 monthly payments which are interest free. **(APR 0%)**

When would you like your cover to start?

Renewal date: 26/11/2013

Home to be insured:

If this address is incorrect, please select [Change](#).

Is this your correspondence address? Yes No [Please select if this is your correspondence address](#)

Cover Details

If any of the below limits are not sufficient, please contact our Service Centre.

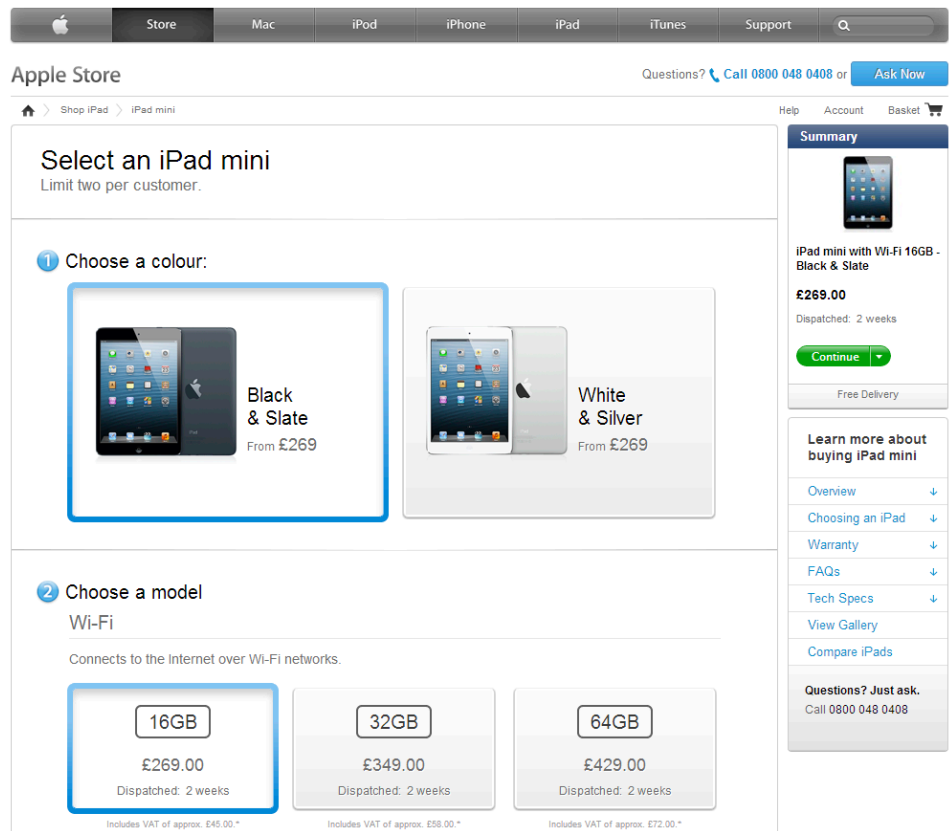
Excess ⓘ

	Limit	Annual Premium		
Buildings Exclude	£400,000	£260.91	Accidental Damage Option	<input type="radio"/> Yes <input checked="" type="radio"/> No ⓘ
Contents Exclude	£50,000	£79.83	Accidental Damage Option	<input type="radio"/> Yes <input checked="" type="radio"/> No ⓘ
High Risk Items (clocks, paintings, works of art, stamp and coin collections)	£7,500			ⓘ
Personal Items	Not Included		Include Cover	<input type="radio"/> Yes <input checked="" type="radio"/> No ⓘ
Technology & Entertainment	Not Included		Include Cover	<input type="radio"/> Yes <input checked="" type="radio"/> No ⓘ
Garden Contents	Not Included		Include Cover	<input type="radio"/> Yes <input checked="" type="radio"/> No ⓘ
Home Emergency Assistance	Not Included		Include Cover	<input type="radio"/> Yes <input checked="" type="radio"/> No ⓘ
Legal Expenses	Not Included		Include Cover	<input type="radio"/> Yes <input checked="" type="radio"/> No ⓘ

You can find out more about the policy cover and display a copy of the full policy wording by clicking on the 'Policy Wording' option contained within the tool bar at the side of the screen.

Apple, in contrast, provide a great example of clear signalling, with progressive primary call to action buttons that are consistently formatted in green to help inform the user of their next step.

Figure 11: Apple clearly signpost their call to action



Zopa too clearly communicate requirements to their users with detailed support text for individual form fields (see Figure 12), something that can be used to convey:

- Date format
- Time format
- Password rules
- 'Optional' status
- Additional costs

Figure 12: Zopa attach support text to individual form fields to provide support for their users

The screenshot shows the Zopa registration process, which is a three-stage form. The current stage is 'Stage 1: Register with Zopa', which is 0% complete. The main heading is 'Register as a Zopa borrower'. The form is divided into several sections:

- Help:** A section with a video player and text: 'Wondering why you should register? Watch this video to find out why your details are safe, and what the benefits are!'.
- Awards we've won:** Text stating 'The UK public recently voted Zopa the 'Most Trusted Personal Loan Provider' for 2012, 2011 and 2010 and 'Best Personal Loan Provider for Service' for 2010 in the Moneywise Customer Service Awards.' accompanied by an award icon.
- Fair and flexible:** A list of benefits:
 - Repay early:** Or in lump sums, at no extra cost.
 - No banks:** Your money goes to real people rather than helping the banks get richer.
 - No commitment:** Apply today, and if you find a cheaper loan tomorrow you can cancel at no cost.
- Registration Form:**
 - Choose a Username:** A text input field with a red 'X' icon and a yellow warning box: 'Either there is already a Zopa account registered with this username or it contains non-alphanumeric characters (a-z, 0-9). Please choose another. Your username must be between 1 and 12 characters'.
 - Email address:** A text input field.
 - Re-type email address:** A text input field.
 - Choose a Password:** A text input field.
 - Confirm Password:** A text input field.
 - Agreements:** Two checkboxes: 'I agree to the Zopa Terms and Conditions and Privacy Policy' (unchecked) and 'I would like to receive occasional updates from Zopa' (checked).
 - Next Step:** A yellow 'NEXT' button.
- Already a member?:** A blue 'SIGN IN NOW' button.

They also include strong persuasive content about their product beside the application form although this is an approach you'll want to consider carefully – such content is very powerful and should certainly be promoted somewhere within the user's journey but be aware that users may take longer to complete the form and become distracted because of it.

Remember

To comply with best practice, always look to include the following information alongside your form:

- Your contact/support details in case the user has a question
- Information on how long the form will take to complete and what details will be required
- Payment options (where relevant)
- Security and data protection policies
- A summary of previous selections if using a multi-step form or during an e-commerce check-out

5

Stop using CAPTCHA tests

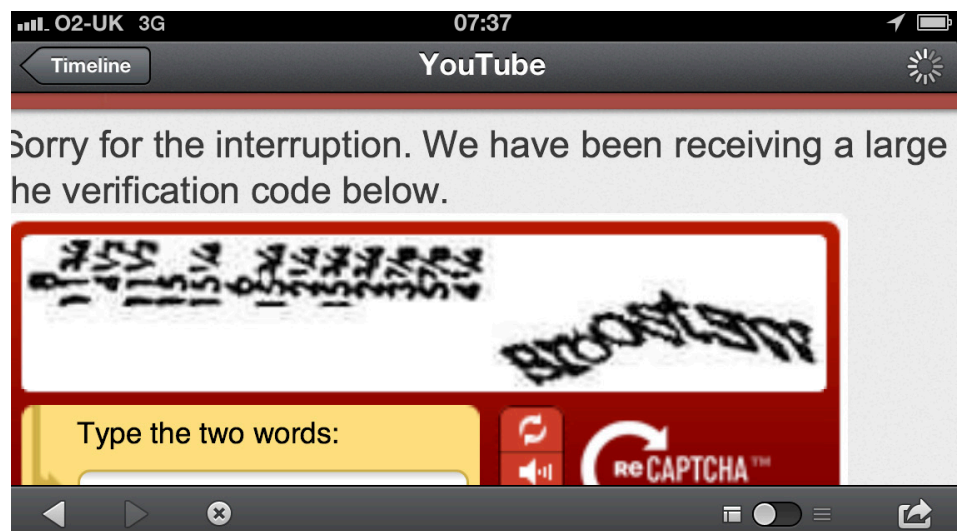
Studies have concluded that it takes a user an average of 28.4 seconds to pass a traditional CAPTCHA (a replication test that proves they are human and not a spam bot), and that their use can reduce a form's conversion rate by around 3% (see David Bushell, ["Further Reading"](#)).

The BBC also tested CAPTCHA to evaluate its impact and concluded:

"The results were not unexpected. Many users did not know what a CAPTCHA was or understand why they were needed. Most users found them annoying. Visually impaired participants expected full accessibility from the BBC and felt it would affect our reputation to use them. Elderly users had issues with the distorted text. The logic puzzles were found to be odd and patronising. The audio was struggled with. Overall, extremely negative feelings were expressed towards CAPTCHA technology"

- Rowun Giles, BBC CAPTCHA and BBC iD

Figure 13: YouTube's CAPTCHA is almost certainly not going to be passed



There are many CAPTCHA techniques, such as image recognition, friend recognition and drag and drop, and all have their advantages and disadvantages. However, there are also an increasing number of 'invisible' solutions to verify users such as:

Preventable tools

Preventable tools stop spammers from delivering junk and in many cases from ever reaching the site in the first place. The Bad Behavior plugin, for example, analyses the HTTP headers, IP address, and other metadata elements of a request to determine whether it is spammy or malicious.

Filter solutions

A filter such as Akismet automatically detects comment and trackback spam and stops it from being published on the site. These tools are often hosted on third-party servers and accessed through plugins and APIs.

Honeypots

Honeypots are systems that hide a blank form field through CSS so only bots can see it. When the form is submitted, it's checked to make sure no data has been inputted into the hidden field.

Remember

Depending on the specific needs of your business and users some of these tools may be more appropriate than others. It may even be that a combination of these and other solutions is required to optimise your form's performance.

Conclusion

Web forms are comprised of many different elements, making it important to ensure that each is given due consideration and designed well to avoid a confusing user experience and deliver value to both the user and site owner.

The motivations behind incorporating a form into a web page are numerous and require that, first and foremost, you consider the purpose of your form. All subsequent decisions should then be based on the specific needs of your users and business, while remembering to make every effort to keep the user journey lean and informative.

To find out more about how we approach user experience design at Box UK, visit our [UX Design](#) page or [get in touch](#) with one of our expert consultants to see how we could help you improve conversion rate, user satisfaction, interactions and engagement.

Further Reading

[Redesigning the Country Selector](#)

Baymard Institute

[In Search Of The Perfect CAPTCHA](#)

David Bushell

[Expedia on how one extra data field can cost \\$12m](#)

Nick Heath

[Fewer fields in a contact form sharply increases conversions](#)

Brian Moloney

[Meet the Obama campaign's \\$250 million fundraising platform](#)

Kyle Rush

[The \\$300 Million Button](#)

Jared M. Spool

[Web Form Design - Filling in the blanks](#)

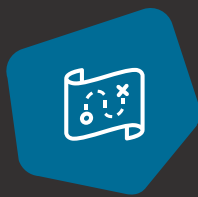
Luke Wroblewski:

[Which Types of Form Fields Lower Landing Page Conversions?](#)

Dan Zarrella:



Simply brilliant thinkers making software brilliantly simple



**Strategy &
Planning**



**User Experience
& Design**



**Software
Consultancy**



**Software
Development**

At Box UK our team of simply brilliant thinkers, consultants and application developers mastermind simply brilliant solutions to the world's toughest web and software projects.

It's why blue chip organisations around the world, from airlines to car manufacturers, international banks to global charities, choose to trust us with the execution of their digital strategies, from the development of enterprise-level custom software platforms to the delivery of award-winning multi-channel experiences.

So if you want an effective, compelling software solution, talk to us.

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